

Thank you for giving me the opportunity to talk briefly with you this afternoon. Having been nurtured at the Cleveland Federation for almost a decade, I have a deep respect for roles volunteer leaders play in the organized Jewish community and an abiding regard for contributions they make to communal well being. It is a privilege for me to speak with you.

Candidly, I did chuckle when I read the title given to my talk-- "*How Bequest Giving Can Transform a Community.*" Why the amusement? Well, I would say that during the three years that I have been at the Jim Joseph Foundation probably seven out of ten grant seekers use the word "transform"--or some derivative of it-- pitching their grant idea to us. When I ask the prospective grantee to define "transformative," I rarely get a definition by which any lexicographer would abide. More importantly, when pressed a little, it turns out most of those seeking funding either sheepishly acknowledge the particular aspect of Jewish life their organization will address really does not need fundamental change or that no amount of funding JJF could grant would be sufficient to enable the organization to have a truly transformative effect on Jewish education—the foundation's exclusive area of interest.

Lisa Taback informs me that the East Bay Jewish community is about to embark on a sustained resource development effort that, if successful could ensure a bedrock for annual funding of Jewish organizations, initiatives and projects dramatically beyond the scale of what currently occurs. That, my friends, does indeed augur potential for transformation, albeit in a highly circumscribed way.

You recall in this past week's *parsha* that Yitro gave Moses sage counsel. As you know, Yitro (Moses' father-in-law) is not Jewish. We learn from this Torah portion that as Rabbi Rona Shapiro notes, "it takes someone who is invested in the Israelite project but outside it to see its flaws and offer the right corrective." I am no outsider, for sure; rather, an active, committed Member of the Tribe. But I am a relative newcomer to the Bay Area who happens to have 16 years' professional experience dealing with myriad issues around financing multiple facets of contemporary Jewish community building. It is from this perspective that I will share with you four examples of legacy giving...perhaps not inspirational but hopefully motivational. I am going to restrict my comments to education, if you don't mind, as this is my area of expertise.

We know that three types of educational experiences are reliable predictors of youth's future involvement in Judaism: residential camping—particularly if the individual participates in two or more summers of camping; day school education—especially high school; and immersive Israel experiences.

A decade ago I had the pleasure of working with a funder who possessed the vision to know that a major infusion of capital could potentially catalyze a community to send significantly greater numbers of its kids to Jewish residential camps. Using money, persuasion, and persistence, the funder was able to bring both the local federation and area synagogues into a partnership that in a five year period increased tenfold (or more—I can't recall exactly) the number of students in the participating synagogues who attended summer camps. Positive project outcomes ranging from better retention of the kids in their synagogue education programs to increased enrollment in youth groups to emergence of those who attended the camps as teen leaders convinced both the original funder and key partner institutions that making the program permanent was critical. In this case, a combination of both current and testamentary giving has helped to institutionalize the program. It is a bona fide success.

In the spirit of the upcoming *chag*, I want so share a brief excerpt from an article in the newsletter the Denver-based (health care conversion) Rose foundation publishes. This is a touching story which shows you one of countless ways thoughtful giving can make a difference in the world:

Ellen Diesenhof's life grew and expanded as many women's lives do; first she was a daughter, then a wife, then a mother, then a grandmother. And for most of it, she was also a teacher. She taught high school English for more than 25 years in New Jersey, and, after moving to Colorado, she became an adjunct professor at Red Rocks Community College. She also taught Hebrew school in both states.

Before her death from cancer in April 2007, Ellen had enjoyed being a member of Congregation Beth Evergreen, a Jewish congregation in the mountains. Around the first anniversary of her death, some members of the congregation purchased a Scroll of Esther, a text which is the basis for the Jewish celebration of Purim. They also arranged for the scroll's creator (the *Sofer*) to give talks to the congregation's adults and children about the requirements for creating this type of document.

These educational events were a success, and led Beth Evergreen Rabbi Jamie Arnold to make this suggestion to Martin [Ellen's husband]: why not establish an annual educational event to honor Ellen, the consummate teacher? Martin agreed and established the Ellen Diesenhof Educational Endowment Fund in 2008. The stated purpose is "...to perpetuate her legacy as a beloved friend and teacher of Jewish values, gatherings and laughter at Beth Evergreen."

The fund established by Martin is actually a subfund of Congregation Beth Evergreen's nonprofit organization endowment fund housed at Rose Community Foundation. Martin established the subfund so that every year around the time of Purim, which is when Ellen died, "the endowment will pay for artists and educators to come in to educate adults and children."

Honoring a Life through an Endowment

The Rose Community Foundation Newsletter—Spring 2009, Page 7.

Turning to the Bay Area and Jim Joseph Foundation in particular, most of you I assume know that the foundation came into being as a bequest. The foundation functions, de facto, as an endowment that itself is designed to exist in perpetuity.

Jim Joseph cared deeply about Jewish education. He was an ardent supporter of Israel. So it makes great sense for the foundation to have awarded \$2.4 million to the Bay Area Jewish day and high schools to devote time, resources, and effort to plan how each school—unique as it is—might enhance its own program of Israel education.

JJF has provided funding for management and technical assistance; for subsidizing one full day of weekly release time for a school-appointed Israel education resource professional; for each school's Israel education leadership team to spend one week this summer in Israel fine tuning the implementation plan on which the respective school is working; the equivalent of \$360 per pupil for Israel-education related activity; and more.

The \$2.4 million grant was for one year. The foundation has now invited the consortium of schools to apply for three to four years of implementation grant support. I expect JJF Directors will review a proposal at our early April foundation Board meeting.

What is striking to us is that only two of the eleven schools (actually, twelve, as Brandeis Hillel occupies two campus sites) have heretofore had a line item in their annual budget allocating dollars to Israel education. You can certainly imagine how indispensable it would be to a school to have the assurance, by way of a generous donor bequest or outright endowment gift, that resources would be available annually to support the school's program of Israel education. Schools that don't have to scramble every year, year in and year out, for funding for the *shaliach*, the capstone trip to Israel, or the teacher exchange program with their Israel "twinned" school are better positioned to be educationally effective and institutionally viable.

I am confident that you are all aware of the phenomenal success of Birthright Israel. In February's seven day registration period, 39,500 young adults applied on-line for the 8,000 to 10,000 spots that will be available for this summer's Birthright trips. We have credible research which

demonstrates Birthright's remarkably positive influence on young adult Jews. There is widespread consensus that for the foreseeable future, Birthright trips coupled with a robust alumni activity hold the greatest promise for connecting a generation of Jews for whom Bar/Bat Mitzvah was their last contact with Jewish tradition and community. Your opportunity to create a legacy by endowing a fund that supports Birthright participation is extraordinary.

Like you, I am distressed by a global economy in free fall; egregious corporate and personal greed, some of it Jewish, debasing our people; persistent, desperate, destructive acts of *jihad* terrorism; political gridlock in Israel. I want to conclude by sharing with you why I think enacting a time-honored Jewish value is one of the most intelligent responses we can make to an imperiled world. To do so, I am going to draw on an analogy from what I suspect you will think is an unusual source.

While U.S. Naval war college senior strategic researcher and author Thomas Barnett does not have the household recognition that Tom Friedman does, I would argue that Barnett's analyses of complex global problems are every bit as seminal as those Friedman popularizes. In describing obstacles

to achieving a balanced, equitable 21st Century globalization, Barnett explains a condition he calls disconnectedness, about which he asserts:

“To be disconnected in this world is to be kept isolated, deprived, repressed and uneducated. For young women, it means being kept—quite literally in many instances—barefoot and pregnant. For young men, it means being kept ignorant and bored and malleable. For the masses, being disconnected means a lack of choice and scarce access to ideas, capital, travel, entertainment, and loved ones overseas. For the elite, maintaining disconnectedness means control and the ability to hoard wealth Our strategic goals, therefore, are to extend connectivity in every way possible, but only in a manner that promotes justice as much as order.”
(p. 49, The Pentagon’s New Map, Thomas P.M. Barnett)

The history of the Jewish people stands as the very antithesis to the condition of disconnectedness Barnett I think accurately ascribes to a dysfunctional global community. And while you may believe that geopolitics and military strategy are entirely remote from philanthropy, the Jewish Community Foundation’s Legacy Society initiative invites you to

donate resources that are likely to bring not only connectedness but security, cohesion, and prosperity to Jewish life in the East Bay.

With G_d's blessing, may you go **l'dor v'dor!**